

Change of Status – In-training Probation

- Purpose** Use this procedure to update an employee's status during an in-training plan appointment.
- Trigger** Perform this procedure when an employee has completed a level or the entire in-training plan while also completing their probation period.
- Prerequisites**
- An employee has successfully completed their probationary period during the in-training plan.
 - An employee has completed a level in their in-training plan.
 - An employee has completed their entire in-training plan.
- End User Roles** In order to perform this transaction you must be assigned the following role:
Personnel Administration Processor










Change History	
Date	Change Description
8/26/2009	Convert procedure in new template with updated screenshots.

Menu Path Human Resources → Personnel Management → Administration → HR Master Data
→ Personnel Actions

Transaction Code PA40

Helpful Hints	<p>Related procedure:</p> <ul style="list-style-type: none"> • Appointment Change After In-training Appointment
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The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:


Message Type	Description
Error 	Example:  Make an entry in all required fields. Action: Fix the problem(s) and then click  (Enter) to validate and proceed.
Warning 	Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. Action: If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.
Confirmation  or 	Example:  Save your entries. Action: Perform the required action to proceed.

Procedure

1. Start the transaction using the above menu path or transaction code **PA40**.


2. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
From	R	The start date of a record. Example: 10/01/2009
Personnel no.	R	An employee's unique identifying number. Example: 5000020

3. Click  (Enter) to validate the information.
4. Click the box to the left of **Change of Status** to select.

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions




Find by
 Person
 Collective search h
 Search Term
 Free search
 Ini test

Personnel no. 5000020
 Name BALANCIO JILL
 PersArea 3500 Sup of Pub Instruction
 PSubarea 0001 Non Represented
 From 10/01/2009
 EEGroup 0 Permanent
 EESubgroup 01 Monthly(M) OT Exempt Status Active

Personnel Actions

Action Type	Personnel	EE group	EE subgr
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Paid Leave of Absence			

- Click  (Execute) to execute the action.

Infotype Edit Goto Extras System Help

Copy Actions

Execute info group Change info group

Pers.No. 5000020
 Name BALANCIO JILL
 PersArea 3500 Sup of Pub Instruction EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exempt Status Active
 Start 10/01/2009 to 12/31/9999

Personnel action
 Action Type UJ Change of Status
 Reason for Action 06 Probationary Period Completed



Status
 Employment 3 Active



Organizational assignment
 Position 71000000 INSTRUCTOR
 Personnel area 3500 Sup of Pub Instruction
 Employee group 0 Permanent
 Employee subgroup 01 Monthly(M) OT Exempt

Additional actions

Start Date	Act.	Action Type	ActR	Reason for action
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6. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Reason for Action	R	It stores the reason that an action has been performed.  Use the  (matchcode) to open selection list. Example: 06 – Probation Period Completed

7. Click  (Enter) to validate the information.
8. Click  (Save) to save

Infotype Edit Goto Extras System Help

Copy Organizational Assignment

Org Structure

Personnel No. 5000020 Name BALANCIO JILL

PersArea 3500 Sup of Pub Instruction EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exempt Status Active

Start 10/01/2009 to 12/31/9999

Enterprise structure

CoCode WA01 STATE OF WASHINGTON

Pers.area 3500 Sup of Pub Instruction Subarea 0001 Non Represented

Cost Ctr 3500000000 DEFAULT AGENCY 35 Bus. Area 3500 Supt. of Public Instruction

Fund

Personnel structure

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 01 Monthly(M) OT Exempt Contract 04 InTrng/Prob

Organizational plan

Percentage 100.00 Assignment

Position 71000000 IN00

Job key 50000658 119H

Exempt N HUMAN RESOURCE CO

Org. Unit 31000028 650

Org.key EMPLOYEE HIRING ORC

Administrator

PersAdmin

Time

PayrAdmin

9.



The employee has completed the In-training Probationary appointment at the lower job class level and must now serve a Trial Service appointment in the new job class. Perform one of the following:

IF	Then
The In-training plan is multi-tiered,	Select InTrng/Prob from the drop-down list in the Contract field and go to Step 10.
The employee has successfully completed the In-training Appointment,	Click Trial Service from the drop-down list in the Contract field and go to Step 10.

Infotype Edit Goto Extras System Help

Copy Organizational Assignment

Org Structure

Personnel No. Name
 PersArea Sup of Pub Instruction EEGroup Permanent
 PSubarea Non Represented EESubgroup Monthly(M) OT Exempt Status
 Start to

Enterprise structure

CoCode STATE OF WASHINGTON
 Pers.area Sup of Pub Instruction Subarea Non Represented
 Cost Ctr DEFAULT AGENCY 35 Bus. Area Supt. of Public Instruction
 Fund

Personnel structure

EE group Permanent Payr.area Semi-monthly
 EE subgroup Monthly(M) OT Exempt Contract

Organizational plan

Percentage **Assignment**
 Position IN00
 INSTRUCTOR
 Job key 119H
 HUMAN RESOURCE CO
 Exempt
 Org. Unit 650
 EMPLOYEE HIRING ORC
 Org.key

Administrator

PersAdmin
 Time
 PayrAdmin



For this procedure example, the employee has completed their In-training Appointment.

10. Click (Enter) to validate the information.
11. Click (Save) to save.

Infotype Edit Goto Extras System Help

Copy Contract Elements

Personnel No. 5000020 Name BALANCIO JILL

PersArea 3500 Sup of Pub Instruction EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exempt Status Active

Start 10/01/2009 to 12/31/9999


Contractual regulations



Contract Type 00 Permanent

Periods

Probationary Period 6 Months

12. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Contract type	R	It defines an employee's State status as either permanent or non-permanent. Example: Permanent
Probationary period	O	This denotes how long an employee is in probation or trial service status.  If the probationary period is not entered, the next infotype (<i>Monitoring of Tasks</i> (0019)) will not appear. Example: 6 Months

13. Click  (Enter) to validate the information.
14. Click  (Save) to save. You will be taken back to the Personnel Actions screen.

HR Master Data Edit Goto Extras Utilities(M) Settings System Help

Personnel Actions

Find by
 Person
 Collective search h
 Search Term
 Free search
 Ini test

Personnel no. 5000020
 Name BALANCIO JILL
 PersArea 3500 Sup of Pub Instruction EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exempt Status A
 From 10/01/2009

Personnel Actions

Action Type	Personnel	EE group	EE subgr
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Paid Leave of Absence			

15. Perform one of the following:

IF	Go To
<i>Monitoring of Tasks</i> (0019) exists and will need to be created or updated,	Step 16
no <i>Monitoring of Tasks</i> (0019) record,	Step 26

16. Access the Maintain HR Master Data Screen, using transaction code **/NPA30**.

HR master data Edit Goto Extras Utilities(M) Settings System Help

Maintain HR Master Data

Personnel no. 5000020
 Name BALANCIO JILL
 PersArea 3500 Sup of Pub Instruction EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exempt Status Active


Find by
 Person
 Collective search h
 Search Term
 Free search
 Ini test

Basic Personal Data Payroll Benefits Time Recording **Addtl. Personal Data**

Infotype text
 Monitoring of Tasks
 Family Member/Dependents
 Education
 Other/Previous Employers
 Objects on Loan
 Additional Personal Data
 Military Service
 Residence Status
 Communication

Period
☐ Period
 From To
☐ Today ☐ Curr. week
☒ All ☐ Current month
☐ From curr. date ☐ Last week
☐ To Current Date ☐ Last month
☐ Current Period ☐ Current Year
 Choose

Direct selection
 Infotype STy

17. Click the **Addtl. Personal Data** tab.
18. Click the box to the left of **Monitoring of Tasks** to select.
19. Click ☐ All to select.
20. Click  (Overview) for an overview of all actions associated with *Monitoring of Tasks* (0019).




Infotype Edit Goto Extras System Help

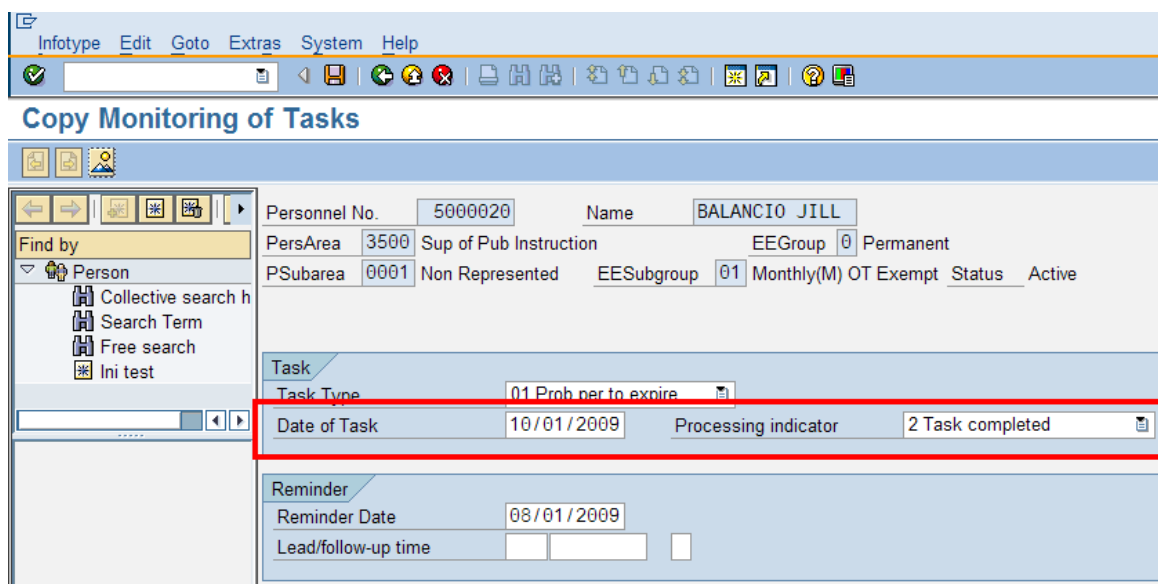
List Monitoring of Tasks

Personnel No. 5000020 Name BALANCIO JILL
 PersArea 3500 Sup of Pub Instruction EEGroup 0 Permanent
 PSubarea 0001 Non Represented EESubgroup 01 Monthly(M) OT Exempt Status Active
 Choose 01/01/1800 to 12/31/9999 STy.



Overview


Task On	Task Type	Task Type Text	Processing indicator	Reminder
10/01/2009	01	Prob per to expire	New task	08/01/2009


21. Click  10/01/2009 01 Prob per to expire New task  08/01/2009 to select.
22. Click  (Copy) to copy and continue.



23. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Task Type	C	A task type is a relevant task that an HRMS user would be expected to perform.  Click  (Dropdown) to view the selection list. Example: 08 Backgrnd Ck Complete
Date of Task	R	It defines an employee's State status as either permanent or non-permanent. Example: 10/01/2009
Processing indicator	C	This is used to signify if a task entered in the Monitoring of Tasks infotype is new, in process, or completed. Example: Task is Completed
Reminder Date	C	This is the date on which the system will remind a user (via report) that a specific period is expiring or a record needs to be updated.

		Example: 07/08/2009
Lead/follow-up time	C	<p>This is the amount of time to be notified in advance or after an event has occurred.</p> <p> This option will populate the <i>Reminder Date</i> field when your entries have been validated.</p> <p>Example: 1 Weeks</p>


24. Click  (Enter) to validate the information.

25. Click  (Save) to save.



If a new task (In-training Complete or Trial Service) will need to be created to reflect the employee's current appointment status, refer to the OLQR User procedure, Monitoring of Tasks – Create and Maintain.

26. You have completed this transaction.

Results
<p>You have updated the employee's state status during an In-training appointment.</p> <p> Once this transaction has been completed, you must complete an Appointment Change action. Please see OLQR User procedure, Appointment Change Action After In-training Appointment.</p>
Comments
None.